VAMS Vaccine Administration Management System

WEST VIRGINIA
Department of
Health &
Human
Resources

Standard Clinic Front Desk
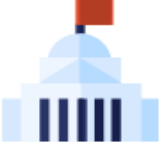
User Manual

Version 3.4.2021

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Introduction – Welcome to VAMS

The Vaccine Administration Management System (VAMS) is a secure, web-based tool built to help jurisdictions, vaccination clinics, organizations, and vaccine recipients manage COVID-19 vaccination efforts. It supports operations and data collection and tracking to meet COVID-19 vaccination requirements.

Four Portals

Each portal is designed for a specific type of user.

Jurisdiction Portal

- Register your jurisdiction
- Add organizations and clinics within your jurisdiction

Organization Portal

- Register your organization's information
- Add organization members for COVID-19 vaccination eligibility

Recipient Portal

- Register my patient information
- Schedule a COVID-19 vaccination appointment
- View my COVID-19 vaccination certificate

Clinic Portal

- Register your clinic information
- Manage vaccination appointments
- Log vaccinations

➢ "Organization" refers to any institution, association, company, or other group that will add critical infrastructure workers and others at-risk groups in VAMS to be considered for COVID-19 vaccination. "Member" is one example of an organization.

➢ Vaccination clinics are often referred to as "vaccine clinics" in VAMS.

PRIVACY NOTE

To receive the COVID-19 vaccine, personally identifiable information (PII) and protected health information (PHI) will be entered into VAMS. PII is any data that could potentially identiy an individual. PHI includes demographic information and relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA visit: https://www.cdc.gov/phlp/publications/topic/hipaa.html

How to Use the User Manual

This manual is to be used by the staff that will manage recipient appointments. This manual will assist you to better understand and manipulate VAMS. In this guide, you will find step by step instructions along with images of the pages to assist you while manipulating VAMS.

Disclaimer

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Your Role and Responsibilities

As the Front Desk member, you are the first person vaccine recipients see as the Front Desk staff. You will use VAMS to:

- Check in recipients,
- Create walk-in appointments, or
- Cancel appointments.

The table below illustrates the activities that only you, as the Front Desk staff, can perform in VAMS.

Responsibilities	Clinic Front Desk	Clinic Healthcare Professional	Clinic Administrator	Clinic Inventory Manager
Serve as clinic point of contact for your jurisdiction			✓	
Manage clinic information (e.g., physical address)			✓	
Set and manage clinic schedule			✓	
Manage clinic's COVID-19 vaccine inventory			✓	✓
Manage (add, edit, remove) VAMS users			✓	
Check in vaccine recipients	✓			
Create walk-in recipient appointments	✓			
Cancel recipient appointments	✓	✓		
Confirm recipient identity	✓	✓		
Administer vaccine to recipients		✓		
View dates when recipients can get their second dose of vaccine		✓		

Navigating VAMS

Quick Tip: VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile devices.

To access VAMS, visit: https://vams.cdc.gov/vaccineportal/s

Below you will find ways to help you navigate VAMS:

Header/Banner

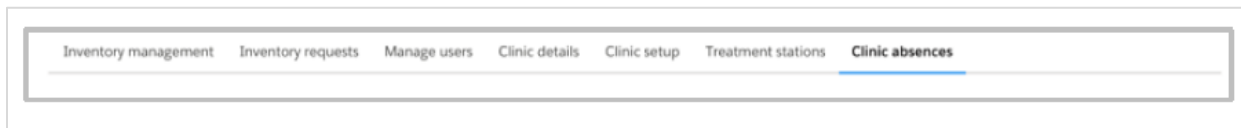**VAMS** Clinic Portal
Vaccine Administration Management System

Jane Doe ▾   ❓ Help

Clicking the **VAMS** logo will return you to your portal's home page. The **Help** link will take you to a list of frequently asked questions (FAQs). The arrow beside your name will drop down and allow you to **log out** of the system.
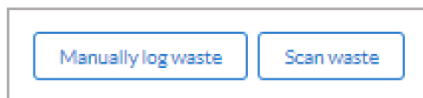
Tabs

Tabs are available at the top of the page and allow you to move between pages. The tab you are currently viewing will be underlined and bolded.

Inventory management	Inventory requests	Manage users	Clinic details	Clinic setup	Treatment stations	**Clinic absences**

Buttons

Buttons will allow you to start, advance, and complete tasks.

Manually log waste   Scan waste

Tables

Tables allow you to sort and filter information. You can view details by clicking the links in each row. You can also filter the columns by clicking on the table headers.

Product ⌄	Manufacturer ⌄	Doses Received ⌄	Doses Remaining ⌄	Date added/reconciled	Status ⌄
Moderna COVID-19 ...	Moderna US, Inc.	1000	998	Feb 5, 2021	Active
Pfizer-BioNTech Covi...	Pfizer Manufacturing ...	2500	2499	Feb 4, 2021	Active
Pfizer-BioNTech Covi...	Pfizer Manufacturing ...	1000	997	Jan 27, 2021	Active

Activate your User Account

To start this step, you will need:

- Internet access
- Email account access
- Registration email from no-reply@mail.vams.cdc.gov

After the Jurisdiction POC enters your name and email address into VAMS, you will get an email containing a link to create a VAMS account.

> ➢ **Quick Tip**: Check your spam or junk folder if it is not in your inbox. If you still cannot find the email, contact your Jurisdiction POC.

1. **Check** your email for the link to set up your account.
2. **Click** the registration link in your email. You will be taken to the account creation page.
   > ➢ **NOTE**: The registration link is for your registration only and cannot be used to register anyone else.
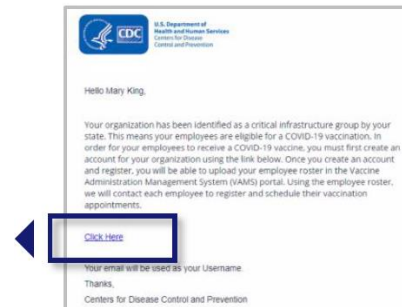
Once you click the link, you will be taken to a page to create a password.

3. **Verify** your email address.
4. **Create** your password.
5. **Check** your email account for a verification code.
6. **Enter** the verification code.
7. Read the terms and conditions and check the box if you agree.
8. Click **Create Account**.

> ➢ **NOTE:** After five unsuccessful login attempts, you will be locked out for one hour.

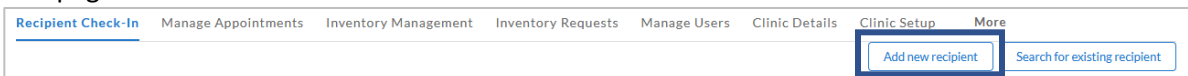**CONGRATULATIONS, YOU SET UP YOUR ACCOUNT!**

Add a New Recipient

Recipients no longer need a VAMS account to be vaccinated in a standard clinic. Adding a New Recipient allows you to schedule a walk-in or future appointment for individuals who do not have accounts and gives you the option to create an account for the recipient so they can access a Recipient Portal.

When adding a new recipient into your standard clinic, you can add their email address on the demographic page. Adding their email address will prompt the recipient to create their VAMS account. The recipient will get an email and then should follow the steps to create their account.

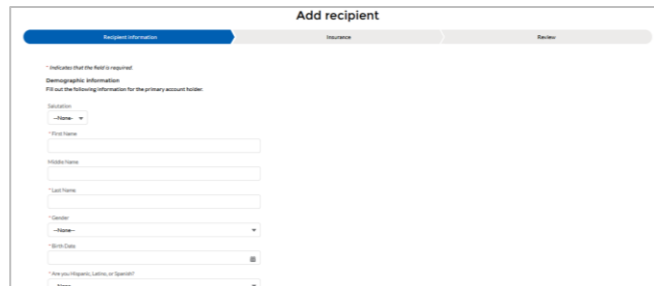**A recipient does not need a VAMS account for you to schedule an appointment.**

To Add a New Recipient:
1. Log into **VAMS** and access your Standard Clinic.
2. You are defaulted to the **Recipient Check-in** tab.
3. Click the **Add New Recipient** button. You are taken to the Add Recipient page.

4. Enter the recipient's required (*) and optional demographic information:
    a. Salutation (optional)
    b. *First Name
    c. Middle Name (optional)
    d. *Last Name
    e. *Gender
    f. *Date of Birth
    g. *Ethnicity
    h. *Race
    i. Priority Group (optional)
    j. *Home address
    k. Email (optional)
    l. Home phone (optional)
    m. Cell phone (optional)
    n. If you've entered an email address, 2 additional prompts will appear. Use the radio buttons to select the recipient's preferred communication method. Then select if you would like to create a VAMS account for the recipient.
    o. Emergency contact name (optional)
    p. Emergency contact number (optional)

5. Click **Next**.
6. Enter the insurance information if necessary but it's not required.
7. Click **Next**. You are taken to the **Add Recipient Review** page.
8. Review the information and if it's correct, select the **By checking this box, I confirm I have reviewed the above information with the recipient, and it is accurate**.
    a. If you need to update any information, click **Previous** to go back and update the information.
9. Click **Finish**.
10. You are taken to the **Recipient Created in VAMS** page.
11. From here, you can choose to **Schedule a walk-in** appointment or **Schedule a future appointment** for this recipient.
12. If the recipient doesn't want a walk-in or future appointment, click the VAMS header to return to your main landing page.

Recipient created in VAMS.

Name: Elsa Frozen
VAMS ID: VAMS-100025795

Schedule the recipient for a walk-in to be seen now or for an appointment at a future date. Or, go to the portal to manage clinic appointments.

Schedule walk-in   Schedule future appointment

View Portal

Recipient Check-in

Once you are logged into VAMS, you will be taken to the Clinic Portal home page. You will complete your daily tasks from the Clinic Portal home page.

Your main role is to check in vaccine recipients.

There are three steps to process checking in a recipient:

1. Verify the recipient's appointment.
2. Confirm the required documentation is complete.
3. Confirm the recipient's identity.

These must be complete before the Healthcare Professional can administer the vaccine!

1. **Verify a recipient's appointment** (2 ways):

Use a QR Code to Find the Recipient

1. When the recipient schedules an appointment, they receive a QR code.
2. Use a mobile device to **scan the recipient's QR code**.
   - If you're logged into VAMS, you will be taken to the recipient's appointment record.
   - If you're not logged in to VAMS, you will be taken to the log in screen and need to log in before accessing the recipient's information.
3. VAMS will **prompt** you to verify the recipient's identity.
4. **Select** the recipient's form of identity.
5. VAMS will update their status to "**Checked in.**"

Manually Find the Recipient

1. **Log in** to VAMS.
2. **Find** the recipient in the recipient table. There is three ways to find a recipient:
   1. Use the drop-down menu to filter the appointments.
   2. Click the column headers to change the order of your view.
   3. Search by entering the recipient's name or email in the address search box.
3. Once the recipient is found, click on the recipient's name.

4. If the recipient has not completed the Pre-vaccination questionnaire, you will be taken to a page asking if the recipient can log into their account to complete the questionnaire or if the Healthcare Provider will complete it when the recipient is with him/her. Choose either option.
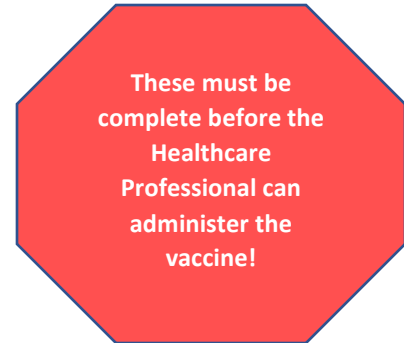5. Click **Continue**.

2. Is the Prevaccination Quesitonnaire complete?

Recipients will receive a notification with a link to the questionnaire before their scheduled appointment. **The recipient should complete questionnaire before receiving the vaccine.** However, the Healthcare Provider can update the status to complete when he/she is with them.

VAMS will notify you if the questionnaire is complete:

- If the questionnaire is complete, you'll see: "The Recipient has completed the Pre-vaccination Questionnaire."
- If the questionnaire is **not** complete, you'll see "Recipient has not yet completed the Pre-vaccination Questionnaire." VAMS will inform you to have the recipient log into their account and complete the questionnaire or ask if the Healthcare Provider will complete the questionnaire.

3. Confirm the Recipient's Identity

Once the appointment is confirmed and the questionnaire is verified:

1. You will be taken to the **Validate Recipient** screen.
   - ➢ To validate a recipient, you must have:
     - o The recipient's first and last name
     - o Their date of birth (DOB)
     - o The recipient matches their photo ID
2. Select the **form of identification.**
3. If the recipient doesn't have valid identification, click **ID required, but not provided**. VAMS will cancel their appointment and send the recipient a notification to reschedule.
4. Click **Next**.
5. The recipient's status will change to either **Checked In** or **Cancelled.**

Check-in recipient

Print QR code

Recipient information

Recipient name
Hannah Ney

Recipient DOB
03/28/1974

Recipient email
hannahney@email.com

* Form of identification
○ State or Federal-issued ID
○ Other valid ID
○ No ID required for this clinic
○ ID required, but not provided

Next

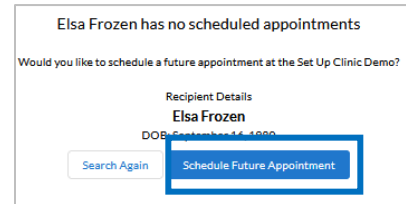- ➢ **NOTE:** If identification is required and isn't provided, the recipient must reschedule their appointment.

Schedule a Future Appointment

Appointments for future vaccinations can be scheduled using the **Schedule Future Appointments** button. The Schedule Future Appointments button will appear after a recipient was added or found in VAMS by using the Add New Recipient button or by Searching for Existing Recipient.

To schedule an appointment, you will first need to add or find the recipient in VAMS. See Add New Recipient or Search for Existing Recipient in the guide for additional help.

Once you add or find the recipient:

1. Click **Schedule future appointment**. You will be taken to a page stating the recipient has no appointments scheduled.
2. Click **Schedule Future Appointment**.

> Elsa Frozen has no scheduled appointments
>
> Would you like to schedule a future appointment at the Set Up Clinic Demo?
>
> Recipient Details
> **Elsa Frozen**
> DOB: September 14, 1989
>
> Search Again   Schedule Future Appointment

3. You will be directed to a **Before you schedule** page asking if the recipient has ever received the vaccination.
   a. If you chose **No**, you will be taken to the **Schedule your 1st dose appointment** page.
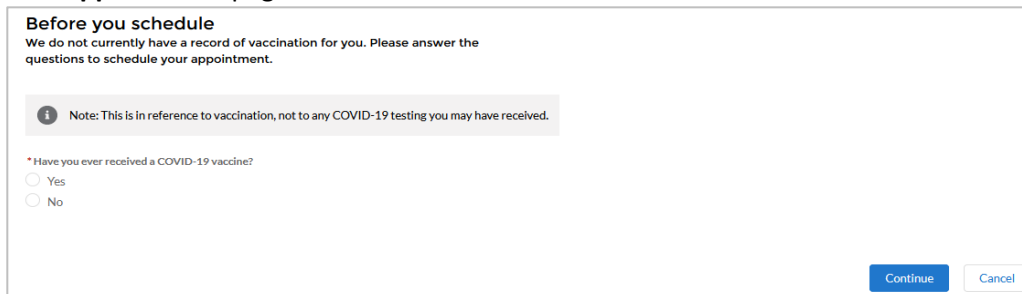   b. If you choose **Yes**, you will be taken to the **Schedule your 2nd dose appointment** page.

Before you schedule
We do not currently have a record of vaccination for you. Please answer the questions to schedule your appointment.

ℹ Note: This is in reference to vaccination, not to any COVID-19 testing you may have received.

*Have you ever received a COVID-19 vaccine?
○ Yes
○ No

Continue   Cancel

4. Available appointments will display on the page.
5. Choose an available appointment.
6. Click **Next**.
7. Review the appointment information on the screen.
8. Click **Submit**.

Cancel Appointments

To cancel a recipient's appointment:

1. Click **Cancel** beside the recipient's name
   in the Appointment's table.

2. A **Confirm Appointment Cancellation**
   pop-up will appear.
3. Select the **cancellation reason**.
4. Click **Cancel Appointment** or **Keep
   Appointment.**
5. If you canceled the appointment, a
   confirmation message will appear. Click
   Ok.

> A recipient has four hours to show for their appointment. If the recipient doesn't show, VAMS
> will automatically update their status to **"no-show"** and will cancel the appointment.
> Cancellations will occur once a day:
>   o If appointments are cancelled before 2pm, they will appear as canceled by 6pm.
>   o If appointments are canceled after 2pm they will show as canceled the following day.
>   Cancellation emails will be sent to the recipients.

Search for an Existing Recipient

You can search, view and add recipients using the **Search for existing recipient** button. VAMS will search for all recipients, including those registered in VAMS as recipients and those added to third-party clinics. Once a recipient is found, you will be able to schedule a walk-in appointment or schedule them for a future appointment.

To search for a recipient:

1. Click the **Search for existing recipient** button. You'll be directed to the Search for Recipient page.

On the **Search for Recipient** page:

2. Enter the recipient's **Email, VAMS system ID or External system ID**.
3. Or enter the recipient's **First Name**, **Last Name or Date of Birth**.
4. Click **Search**.

5. If the recipient exists, a **Search Results** table will appear blow.

6. If you want to add the recipient to your clinic, click the **Schedule walk in**.
7. You will be taken to another screen that notifies you of the next available walk-in appointment. The recipient will be reserved for that future appointment.

Conflicting Appointment

A recipient may have an appointment scheduled at a clinic other than yours. Complete the following steps to add the recipient to your clinic.

1. A **Conflicting Appointment** pop-up will appear.
2. Choose to **Keep** or **Cancel** the exiting appointment.
   a. If you cancel the appointment, you will be given the opportunity to schedule a walk-in with you.

To Keep the Appointment:	To Cancel the Appointment:
1. Select **No, keep the existing appointment.** 2. Click **Submit.**	1. Select **Yes, cancel the existing appointment and reschedule a walk-in appointment.** 2. Click **Submit**. 3. A **Confirm appointment cancellation** pop-up appears. 4. Click **Cancel Appointment**. a. Canceling the appointment, add the recipient to your list of appointments. 5. You are now directed to the **Appointment Confirmation** page to enter the walk-in details. NOTE: The recipient will receive a Pre-vaccination Questionnaire and to confirm they reviewed the Emergency Use Authorization (EUA) fact sheet and Vaccine Information Statement (VIS). Both actions need to be completed before the recipient is checked in. 6. You can confirm these details or use the QR code to check the recipient in.

➢ **NOTE:** Walk-ins will be scheduled for the current time slot but may have to wait based on your clinic's current capacity.

Register as a COVID-19 Vaccine Recipient

To register for a vaccine, your Clinic Administer will need to add you as a member of the organization. When your Clinic Administrator adds you as a member, you will receive an email for you to register for the vaccination.

1. Click on the recipient **registration link** in your email. You will be taken to the **Welcome to VAMS** pop up.
2. Enter your **email address**.
3. Enter the **same password** you use when you log in as a user.
4. Click the box beside **I'm not a robot.**

5. Click **Login.** You will be taken to the **Portal Selection** screen**.**

   ➢ **NOTE**: Every time you log into VAMS, you will be asked to verify your identity twice. After five failed attempts, you will be locked out of VAMS for one hour.

6. Click **Access Portal** below the clinical or recipient portal to complete the vaccination registration process.

   ➢ **NOTE:** While logged into VAMS, you will be able to switch portals by clicking the drop-down arrow next to your name in the upper right corner and then select **Switch Portals**.

Access Multiple Clinics in VAMS

If the Clinic Administrator adds you as a user at their clinic, you can access the other clinics once you have logged into VAMS.

1. On any page in VAMS, click on the **drop-down arrow** next to your name in the upper right-hand side of the screen.
2. Click **Switch Portals**.

If you have multi-user access, you will be taken to the portal selection page.

3. You will be taken to the **Clinic Selection** page.
4. Select the **Access Portal** button of the clinic you would like to access.
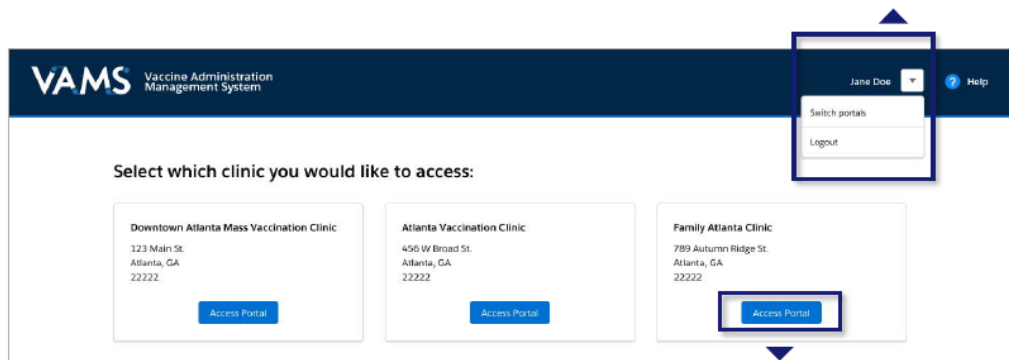
Glossary of Terms

Word/Phrase	Definition
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain vaccine product identification information, lot number, and expiration date.
Member	Any worker, staff member, volunteer, other personnel or organization being added to VAMS to receive COVID-19 vaccine.
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., mobile clinic bus or van).
Multi-clinic User	A clinic user who performs the same or different roles at multiple clinics registered in VAMS. This user can switch between clinic accounts within the clinic portal.
Multi-user	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is registered as a VAMS recipient can access the Clinic Portal and Recipient Portal).
Organization	Any institution, association, company, or other group that will add their essential workers to VAMS.
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., clinic set up in a school gym that will stay at that location while it is open).
Third Party Clinic	A vaccination clinic established at a facility like a long-term care facility or correctional facility where the facility will be responsible for administering vaccines to recipients.
Treatment Station	Vaccination stations are currently called "treatment stations" in VAMS and therefore in parts of this user manual.
Unit of Sale (UoS)	The packaging in which the vaccine vials are delivered.
Unit of Use (UoU)	The vaccine vials.
Vaccine Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a 'vaccine clinic' in VAMS and their user manual).